CFAW is excited to launch this new ½ day conference designed specifically for RIA firm leaders. The audience will hear from CEOs, portfolio managers, compliance officers and regulators on what pitfalls to consider when building out their tech stack as well as hear about what is to come in the world of financial software.

This conference is a great way to get in front of a target audience of RIA firm leaders including CEOs, CCOs, CTOs, PMs, wealth managers, etc. There is a very attractive sponsorship package for this conference which includes the opportunity to have an exhibit table if you wish.

If your firm sells into RIA firms, contact CFAW today to reserve your sponsorship of this conference while they last.

KEYNOTE SPEAKER:

JOEL P. BRUCKENSTEIN, CFS, CMFC, CFP

Joel P. Bruckenstein, CFP, is an internationally recognized expert on applied technology for financial professionals and Publisher of Technology Tools for Today (T3) — formerly Virtual Office News, now dubbed the T3 Tech Hub. He is also the producer of the annual T3 Advisor Conference, the premier technology conference for independent financial advisors, as well as the T3 Enterprise Conference, an annual gathering of top executives from independent broker/dealers and large RIAs.

Mr. Bruckenstein has for more than twenty years advised financial service firms of all sizes on improving their technologies, processes and workflows. He is the co-author of three books: Virtual Office Tools for a High Margin Practice, Tools and Techniques of Practice Management, and Technology Tools for Today’s High Margin Practice. Joel writes regularly for Financial Advisor magazine and Financial Planning magazine. In addition, he compiles the annual technology survey for Financial Planning magazine.

Joel accepted the fifth annual Leadership Award bestowed by Bob Veres’ Insider’s Forum, a conference that brings together the leading figures of the financial planning profession during a main stage presentation at the Insider’s Forum held September 6-8, 2017 in Nashville, TN.
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